

**CalPERS.**

**When You Need Us.**



**ONLINE**

**IN PERSON**

**ON THE PHONE**



It's easy to get the assistance you need –  
when you need it. Your time is valuable,  
so we want to make your connection to  
CalPERS quick and easy.

# ONLINE

CalPERS is available to you **whenever** you want and **wherever** you are, by simply going online – **CalPERS On-Line!** Your first stop when you need information on a CalPERS program or service should be our Web site. You may find everything you need – without picking up the phone or finding the time to visit one of our Regional Offices – right on your computer.

## Benefit & Program Information

- Complete online library on Health, Retirement, Death Benefits, Deferred Compensation and other Supplemental Savings Programs, Long-Term Care Program, Member Home Loan Program, and more.
- Answers to frequently asked questions.
- Legislation, laws, and statutes impacting benefits.
- Access to the latest CalPERS news, Board meeting and agenda materials, press releases, newsletters, and articles.
- A “Life Event” guide – understand how life events, like marriage, the birth of a child, or the death of a loved one, can impact your CalPERS benefits and what steps you may need to take.



## Retirement Planning Tools

- Create a Retirement Planning Estimate – Use Your Annual Member Statement Data
- Create a Retirement Planning Estimate – Enter Your Own Data
- Open Your Saved Retirement Estimates
- Estimate a Service Credit Purchase Cost
- View Your Latest Annual Member Statement
- Register for a CalPERS Seminar, Workshop, or Event



www.calpers.ca.gov

### Requests for Services

- Request An Official CalPERS Retirement Estimate.
- Change Your Address.
- Order CalPERS Forms and Publications.

### Available eSubscription Services


- CalPERS eNews – bimonthly newsletter sent directly to your e-mailbox.
- CalPERS ePress Alerts – get an e-mail notification when a press release is added to our Web site.
- Coming soon – CalPERS eAgenda – e-mail notification when Board agendas and agenda items are posted.



### Other Online Services

- Ask CalPERS – ask your questions right online!
- Get Driving Directions.
- Health Plan Chooser.
- Health Plan Search by ZIP Code.
- Current Home Loan Interest Rates.
- Long-Term Care Monthly Rates Calculator.
- Current 457 Plan Fund Net Daily Assets.
- Seminars and Workshops Dates and Locations.

### Getting Started

- From our Home Page, choose **For Members**.
  - Select and save your **Member View** (you tell us who you are and we'll provide you the information that's right for you, and you won't need to tell us again the next time you return).
  - Need more help finding what you need? Try our **Search** feature, or **Take an Online Tour** and review our **Navigation Tips** (both available by using the About Our Site link in the green masthead bar).
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## IN PERSON

We have eight Regional Offices located throughout the State in **Sacramento, San Francisco, San Jose, Fresno, Glendale, Orange, San Bernardino, and San Diego.** During normal business hours, you'll find our staff available to provide you a variety of services and educational events.



### In Office Services

- Drop off or pick up forms or publications.
- Submit a form or application that needs a CalPERS signature.
- Retirement planning information.
- Personal retirement counseling (by appointment).
- Information and assistance on all CalPERS programs and services.
- Emergency retirement assistance for those facing a terminal illness.

### Education Programs

- Retirement and Estate Planning seminars.
  - Achieving Financial Security seminars.
  - Retirement Planning workshops.
  - Financial Planning – Already Retired.
  - Job-site, employer-sponsored retirement workshops.
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# CalPERS Regional Offices

## Getting Started

- Appointments are not required but are recommended, especially if you need specific information on your personal situation.
- Before you make your appointment, it's best to **first** attend one of our education events (a seminar or workshop) **and** get a retirement estimate (use our one of our online estimate services or submit an official request form). Since appointment times fill up quickly, doing these things first means we can get you all the help you need faster!
- To make an appointment, call our Customer Contact Center at **888-CalPERS** (or **888-225-7377**).
- Find a Regional Office address by visiting the CalPERS On-Line Web site or in the local phone directory.
- Office business hours are Monday to Friday, 8 a.m. to 5 p.m.



## Come Prepared

To avoid having to wait, help us help you by following a few simple steps.

- Write down your questions in advance, that way you won't forget something and we can make sure to cover all your concerns.
- Do your best to complete forms or applications before your visit – a great time saver!
- If you're married, bring along your spouse. Some documentation will require both of your signatures. (Don't forget to bring along picture ID for each of you.)
- Make sure you bring any needed personal documents, such as your marriage certificate, etc.

# ON THE PHONE

Our Customer Contact Center staff are available during normal business hours to give you the direct assistance you need. But, since CalPERS receives almost 1 million phone calls a year, there are times when you may encounter a waiting period or delay in talking with one of our agents.

That's why we recommend you try CalPERS On-Line first to get the information you need. But, if your computer isn't handy, there's still a way to avoid busy signals or waiting on hold. Our Contact Center offers a state-of-the art interactive voice response (IVR) system. The IVR options are your doorway to helping yourself to CalPERS programs and services.

Of course, we're still here to talk with you directly too. Our staff are specially trained to get your questions answered correctly, the first time you ask. If your situation is a bit more complex, don't worry, we'll get all the information we need from you and then make sure someone gets back to you to solve your problem or concern.

## Interactive Voice Response (IVR) Resources

- Get general benefit and program information or answers to frequently asked questions.
- Special announcements on important and timely CalPERS programs and events.
- Order forms and publications.
- Find information on available health plans in your area and get the phone number to reach them.
- Coming in 2006 – you'll be able to change your address, right through the IVR system.





# 888 CalPERS (or 888-225-7377)

## Speak to a CalPERS Agent

- Reporting a lost or stolen benefit check.
- Addressing more complex retirement, health, or other CalPERS program questions.
- Reporting the death of a CalPERS member.
- Requesting Regional Office services, such as individual appointments or employer-sponsored education events.

## Getting Started

- Call toll-free at **888-CalPERS** (or **888-225-7377**) – please note that while this is a toll-free call, our number does **not** have an **800** area code.
- Our phone system responds to voice commands, not dial options. So, at the first menu prompt, say **Member**, since you want to discuss a member issue.
- Be sure to listen to all the automated IVR options to see if you can find everything you need without talking to an agent.
- If the subject of your call is not provided to you as an option by the phone prompts, just say **Agent** to get assistance.
- Have your Social Security number ready. We'll be asking for that as a security precaution to protect your personal information and so our Agent can be ready to assist you.

## Be Prepared

- There are certain times when our phones are busier than others. We want to be available to you when you call, so if possible you should avoid calling during the following heavy call volume times.
- Mondays.
- Day immediately after a business holiday.
- First week of each month.
- First days of the calendar year.

## CalPERS. When You Need Us.

**Online** [www.calpers.ca.gov](http://www.calpers.ca.gov)

**In Person** **CalPERS Regional Offices**

Sacramento

San Francisco

Glendale

Orange

Fresno

San Jose

San Bernardino

San Diego

**On The Phone** **888 CalPERS** (or 888-225-7377)



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Office of Public Affairs  
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